

**PAUMCS Annual Business Meeting 2024**  
**Saturday, April 6, 2024**  
**Memphis, TN**

Rhonda reminded everyone that only members in good standing may vote, but all attendees are welcome. The conference bar is on the classroom-style tables. Non-voting attendees can sit at the round tables. Online participants will be polled as needed. She introduced Ria as Secretary and Cheryl as Parliamentarian. Rhonda reminded the floor of the rules and told them to use the microphones to make a motion or ask a question.

**Call to Order**

Rhonda called the meeting to order at 1:35 pm.

**Acceptance of Agenda**

The agenda has been online for 30 days for printing and viewing purposes. Eva Jankoski, Michigan, moved to accept the presented agenda, seconded by Laura Valonza, Washington State. All were in favor. The motion passed.

**President's Welcome**

Rhonda Ramsey welcomed everyone to the 2024 annual business meeting and spoke of her history with PAUMCS. She then introduced Tammie Ruffle as the GCFA liaison.

**Greetings from The General Council on Finance and Administration.** Tammie Ruffle, on behalf of Moses Kumar, welcomed all to the annual business meeting and explained PAUMCS. Online Certification registration is open now. Advanced Certification is in 2025.

**Reports on Administration and Finance**

**2023 Annual Conference Minutes – Ria Fruscello**

Motion to accept presented minutes by Chris Grosson –Tennessee Western KY, seconded by Suzanne Edwards. The motion passed.

**By-law Revisions – Ria Fruscello**

Motion to accept presented by-law revisions by Bev Rhodes – Missouri, seconded by Josie Hickom - North Georgia. The motion passed.

**2023 Treasurer's Report – Wendy Miller**

All reports are attached. During the conference, the offering for the scholarship fund was \$530 and the offering for Soul Force Mission was \$399.

**Presentation of the Proposed 2025 Annual Budget**

Robin Stanfield spoke on financial stability and incredible growth opportunities and asked if there were any questions. Vote taken to accept the budget. All in favor. Budget passed.

After the budget was passed, Rosa Schill asked about the increase in membership costs. Rhonda spoke about rising costs in everything. Bev Rhodes asked where the money came from to cover the loss from the 2023 conference. Dora Thackery asked for clarification on the voting. The answer was that EC had already decided, but everyone approved the budget just a moment ago.

## **Reports on Communication and Membership**

### **Chapter Report**

#### **Nominating Committee Report**

Timolin Colbert—The slate of officers is on the website. Corrections were made yesterday. The nominating committee appreciates it. The slate of officers will be presented. Ballots are available if needed.

#### **Election of 2024-2025 Slate of Officers**

President – Brenda Lockhart – CLOSED  
VP – Gail Douglas-Boykin – CLOSED  
Secretary – Bindy Lewis – CLOSED  
Treasurer – Wendy Miller – CLOSED  
Membership Chair – Lonna Nunn – CLOSED  
Finance Committee – Robin Stanfield – CLOSED  
PTS Committee – Judy Gross – CLOSED  
Nominating – Timolin Colbert CLOSED  
Communications – Ria Fruscello CLOSED  
Class of 2027 Communications Committee – Ria CLOSED  
Class of 2027 Finance Committee – Robin CLOSED  
Class of 2027 Finance Committee – Chris Grosson CLOSED  
Class of 2027 PTS - Ronda Riffe-Rathje CLOSED  
Class of 2027 PTS - Eva Jankowski CLOSED  
Class 2026 Membership – Natalie Valerio CLOSED  
Class of 2027 Membership – Alison Huskey CLOSED

#### **Motions for Class 2025 Nominating Committee**

Lisa Gleason – Ohio nominates Mandana Norbeck, Michigan - Accepted nomination.

#### **Motions for Class of 2027 Nominating Committee**

Emily Stanfield nominated Melanie Churchhill Arkansas. Accepted nomination.  
Rosa Schill nominated Tiffany Simmons Cooper, Arkansas. Accepted nomination.  
Bev Rhodes nominated Crystal Tibbs, Missouri. Accepted nomination.  
Judy Gross nominated Rhonda Whitley, Louisiana. Accepted nomination.

The Nominating Committee passed out blue and orange ballots for the top 2 votes from each member.

Crystal Tibbs and Rhonda Whitley won – CLOSED.

#### **Acceptance of Slate**

Motion – Rhonda Ramsey  
Seconded - Chris Spaeth – TWK

#### **Vice Presidents Report**

Brenda Lockhart thanked Robin and the site committee. Every bit was God-ordained. She thanked the online participants and hopes that they have been engaged. Brenda reminded chapters to think about hosting. EC can help serve. VP is a big job, and Gail will be hounding everyone.

Josie Hickom reminded everyone that two chapters can come together to host. Gail reminded everyone that they could write a letter to the VP and Pres stating intentions to host. Online will still be offered.

### **2025 Annual Conference Invitation**

Judy Gross presented video invitation from Bishop Delores J. Williamston for the 2025 conference with the theme of "Be Still and Know" based on Psalm 46:10. The conference will be April 3-5, 2025.

Judy works for the Wesley Center, which is a spiritual retreat center. Hotel-style rooms. 64 rooms mean you will have to share rooms. 7 miles from Alexandria. They will provide transportation from the airport. There is a zip line, walking trails, and basketball courts. All meals and rooms are included in the registration, which should be less expensive. The food is wonderful. Accommodations for food allergies. There is wi-fi.

### **Membership**

Gail Douglas-Boykin, the current membership chair, spoke about the database. A meeting regarding the new database is scheduled for May 10th. Keep us in prayer. EC has committed to making a decision, and we are working diligently.

### **Recognition of Outgoing Officers and Standing Committee Members**

Timolin Colbert recognized outgoing officers, Rhonda Ramsey and Christol Medley. Donna Ireland, LeAnn Rowles, Libby Craven, Cheryl Wood, Pati Ruane, and Sonia Gallimore

### **Reports on Certification and Future Conferences and 2023 Certification Classes**

Tammie Ruffle presented 24 students for online certification and 21 students, with 20 students for advanced certification because Betty Barton was already advanced certified. Tammie recognized Bindy Lewis for doing both certifications in one year.

### **Professional Training and Standards Committee Report**

Judy Gross presented. See the attached. The highlight is that four members of the certification class and eight for advanced certification received scholarships.

### **Adjournment**

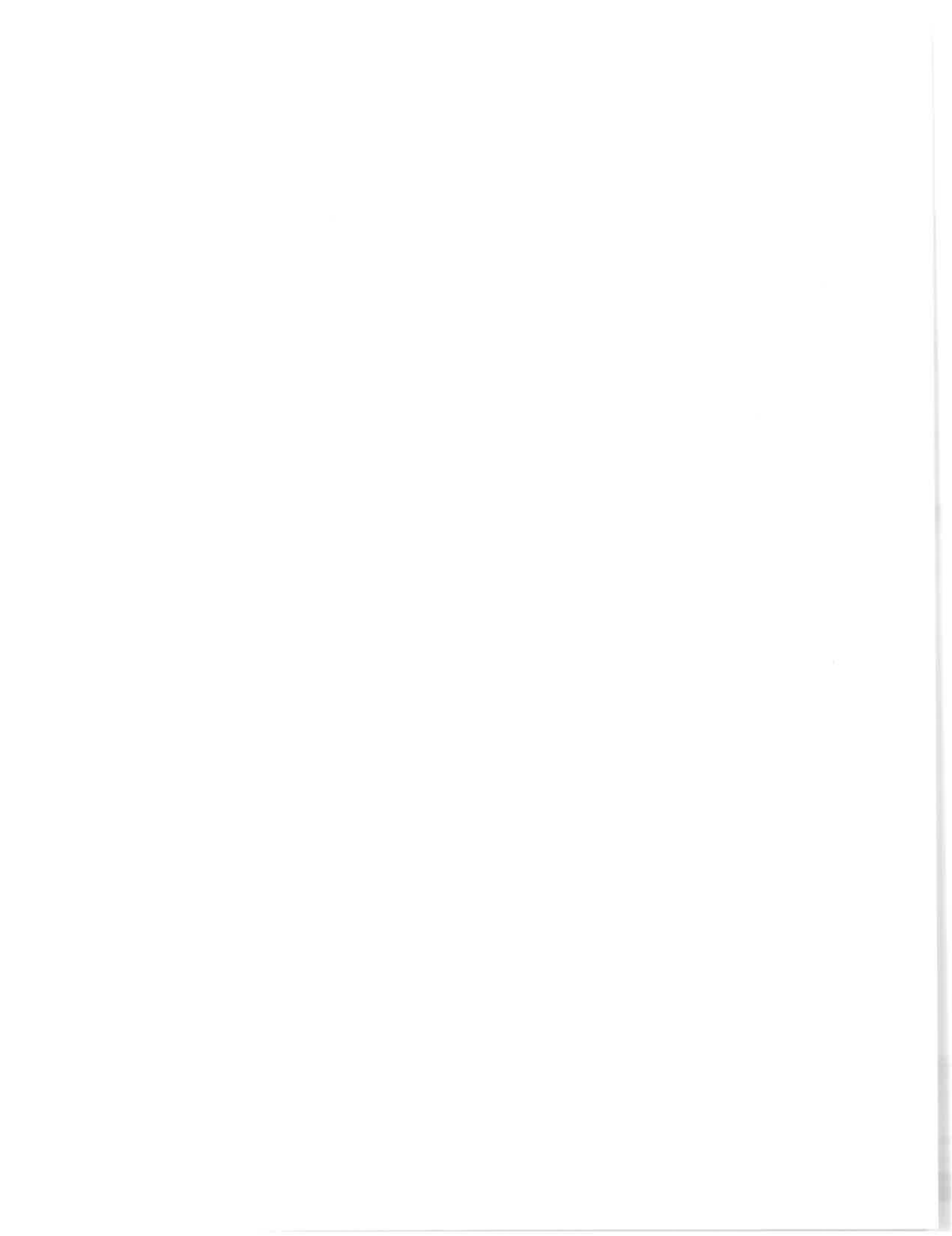
Motion to adjourn – Gail Douglas Boykin, NY

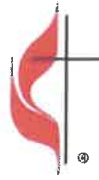
Seconded – Judy Gross, Louisiana

All in favor.

Adjourned at 2:50 pm

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# PAUMCS

PROFESSIONAL ADMINISTRATORS  
OF THE UNITED METHODIST  
CONNECTIONAL STRUCTURE

## **41<sup>st</sup> Annual Business Meeting**

**Saturday, April 6, 2024**

**Memphis, Tennessee**

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**Call to Order**

**Acceptance of Agenda**

**President's Welcome**

**Greetings from The General Council on Finance and Administration**

**Report of the Finance and Administration Working Team**

**2023 Annual Conference Minutes**

**By-law Revisions**

**2023 Treasurer's Report**

**2023 Income and Expense Report**

**2023 Annual Conference Report**

**Endowment Fund Update**

**Presentation of the Proposed 2025 Annual Budget**

**Report of the Membership and Promotion Working Team**

**Communication Update**

**Membership Update**

**Chapter Report**

**Nominating Committee Report**

**Election of Officers**

**Recognition of Outgoing Officers**

**Report of the Conference and Certification Working Team**

**Report on 2023 Certification Class**

**Professional Training and Standards Committee Report**

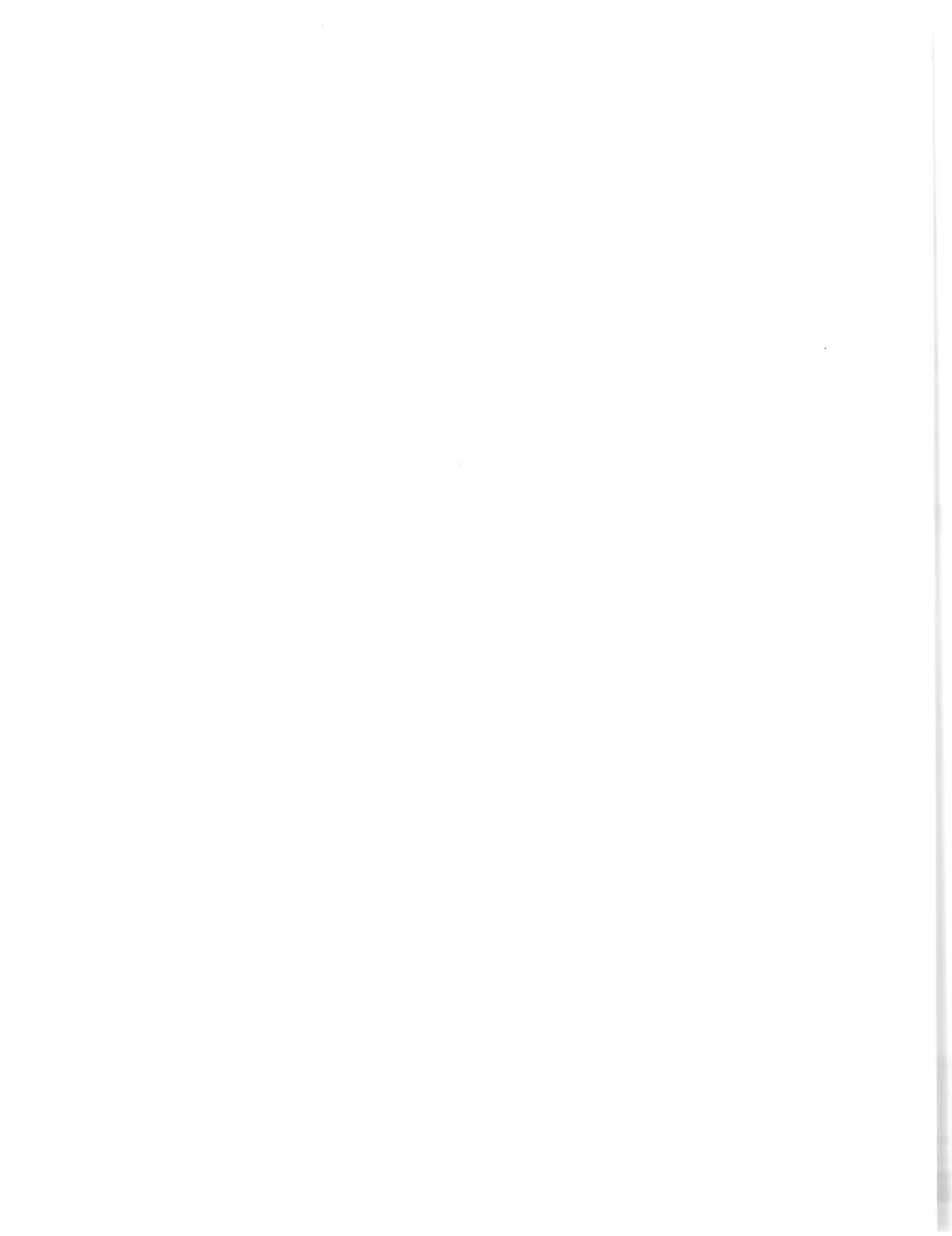
**Vice President's Report**

**2025 Annual Conference Invitation**

**Adjournment**

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*Everyone present may discuss items of business; however, only national PAUMCS members seated within the bar of the conference may vote.*



# Professional Administrators of the United Methodist Connectional Structure

## Profit & Loss Budget Vs. Actual

January - December 2023

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
<b>Revenue</b>				
Annual Meeting Income				
2023 Conference registration	2,000.00		2,000.00	
2024 Conference Registration	8,562.00		8,562.00	
EFT Registration Income/Vanco	21,730.00		21,730.00	
Guests	1,000.00		1,000.00	
Meals for Registrants	2,748.19	0.00	2,748.19	
Sponsor	1,000.00		1,000.00	
<b>Total Meals for Registrants</b>	<b>3,748.19</b>	<b>0.00</b>	<b>3,748.19</b>	
Registration	2,175.00		2,175.00	
Virtual Registration	3,925.00		3,925.00	
Wednesday Outing	1,525.00		1,525.00	
<b>Total Annual Meeting Income</b>	<b>44,665.19</b>	<b>0.00</b>	<b>44,665.19</b>	
<b>Endowment</b>				
Endowment Donations	7.00		7.00	
Endowment Interest/Dividends	1,948.04		1,948.04	
<b>Total Endowment</b>	<b>1,955.04</b>		<b>1,955.04</b>	
<b>Interest</b>				
Interest	26.95		26.95	
Checking	14.52		14.52	
GCFA	282.72		282.72	
Money Market	325.00		325.00	
<b>Total Interest</b>	<b>649.19</b>		<b>649.19</b>	
Membership dues	9,050.00	10,500.00	-1,450.00	86.19 %
Miscellaneous (includes Anticipated GCFA Grant)	8,747.78	6,000.00	2,747.78	145.80 %
Money Market Transfer		8,125.00	-8,125.00	
PAUMCS Memorial Scholarship Fund	1,093.00		1,093.00	
<b>Promotional Items</b>				
Charm	624.00		624.00	
<b>Total Promotional Items</b>	<b>624.00</b>		<b>624.00</b>	
<b>Total Revenue</b>	<b>\$66,784.20</b>	<b>\$24,625.00</b>	<b>\$42,159.20</b>	<b>271.20 %</b>
<b>GROSS PROFIT</b>	<b>\$66,784.20</b>	<b>\$24,625.00</b>	<b>\$42,159.20</b>	<b>271.20 %</b>
<b>Expenditures</b>				
<b>Annual Meeting Expenses</b>				
Chapter Reimbursement	456.50		456.50	
Dinner Cruise Guest	680.00		680.00	
EFT Fees for Registration	1,043.06		1,043.06	
Equipment	7,740.32		7,740.32	
Meals/Breaks	26,904.62		26,904.62	
Miscellaneous	2,844.32		2,844.32	
Name Tags	90.00		90.00	
Printed Material	50.00		50.00	
Registration Refund	700.00		700.00	

# Professional Administrators of the United Methodist Connectional Structure

## Profit & Loss Budget Vs. Actual

January - December 2023

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Speakers	1,500.00		1,500.00	
Wednesday Outing	1,860.00		1,860.00	
<b>Total Annual Meeting Expenses</b>	<b>43,868.82</b>		<b>43,868.82</b>	
Certification	2,003.58		2,003.58	
Communications	40.00		40.00	
Database Maintenance/Host	25.00	3,000.00	-2,975.00	0.83 %
Promotional Publicity		1,000.00	-1,000.00	
Website Renewal	50.00		50.00	
<b>Total Communications</b>	<b>115.00</b>	<b>4,000.00</b>	<b>-3,885.00</b>	<b>2.88 %</b>
Endowment Expenses	5.69		5.69	
Fees	187.13		187.13	
<b>Total Endowment Expenses</b>	<b>192.82</b>		<b>192.82</b>	
Executive Committee				
Admin Expenses				
Archives		25.00	-25.00	
Postage	78.80	25.00	53.80	315.20 %
Supplies/Other		600.00	-600.00	
Travel/Meals	17,855.73		17,855.73	
<b>Total Admin Expenses</b>	<b>17,934.53</b>	<b>650.00</b>	<b>17,284.53</b>	<b>2,759.16 %</b>
<b>Total Executive Committee</b>	<b>17,934.53</b>	<b>650.00</b>	<b>17,284.53</b>	<b>2,759.16 %</b>
Executive Committee Admin.				
Exec. Com. Meals/Lodging	4,815.60		4,815.60	
Exec Comm Meals/Lodging Winter Meeting		3,300.00	-3,300.00	
Exec. Comm. Meals/Lodging Annual Conf. (Spring) Meeting		2,700.00	-2,700.00	
<b>Total Exec. Com. Meals/Lodging</b>	<b>4,815.60</b>	<b>6,000.00</b>	<b>-1,184.40</b>	<b>80.26 %</b>
Exec. Committee Travel	5,042.47		5,042.47	
Exec Comm. Travel / Winter Meeting		5,500.00	-5,500.00	
Exec. Comm. Travel / Annual Conference (Spring) Meeting		4,500.00	-4,500.00	
<b>Total Exec. Committee Travel</b>	<b>5,042.47</b>	<b>10,000.00</b>	<b>-4,957.53</b>	<b>50.42 %</b>
<b>Total Executive Committee Admin.</b>	<b>9,858.07</b>	<b>16,000.00</b>	<b>-6,141.93</b>	<b>61.61 %</b>
Finance Committee				
Audit/Review		2,500.00	-2,500.00	
EFT fees/Vanco/Other	509.12	500.00	9.12	101.82 %
Finance Supplies/Quickbooks		300.00	-300.00	
Membership Fees online	282.15	400.00	-117.85	70.54 %
Miscellaneous Fees	0.17		0.17	
Postage/Finance	8.37	50.00	-41.63	16.74 %
<b>Total Finance Committee</b>	<b>799.81</b>	<b>3,750.00</b>	<b>-2,950.19</b>	<b>21.33 %</b>
Membership				
Membership Expenses	50.00	25.00	25.00	200.00 %
<b>Total Membership</b>	<b>50.00</b>	<b>25.00</b>	<b>25.00</b>	<b>200.00 %</b>

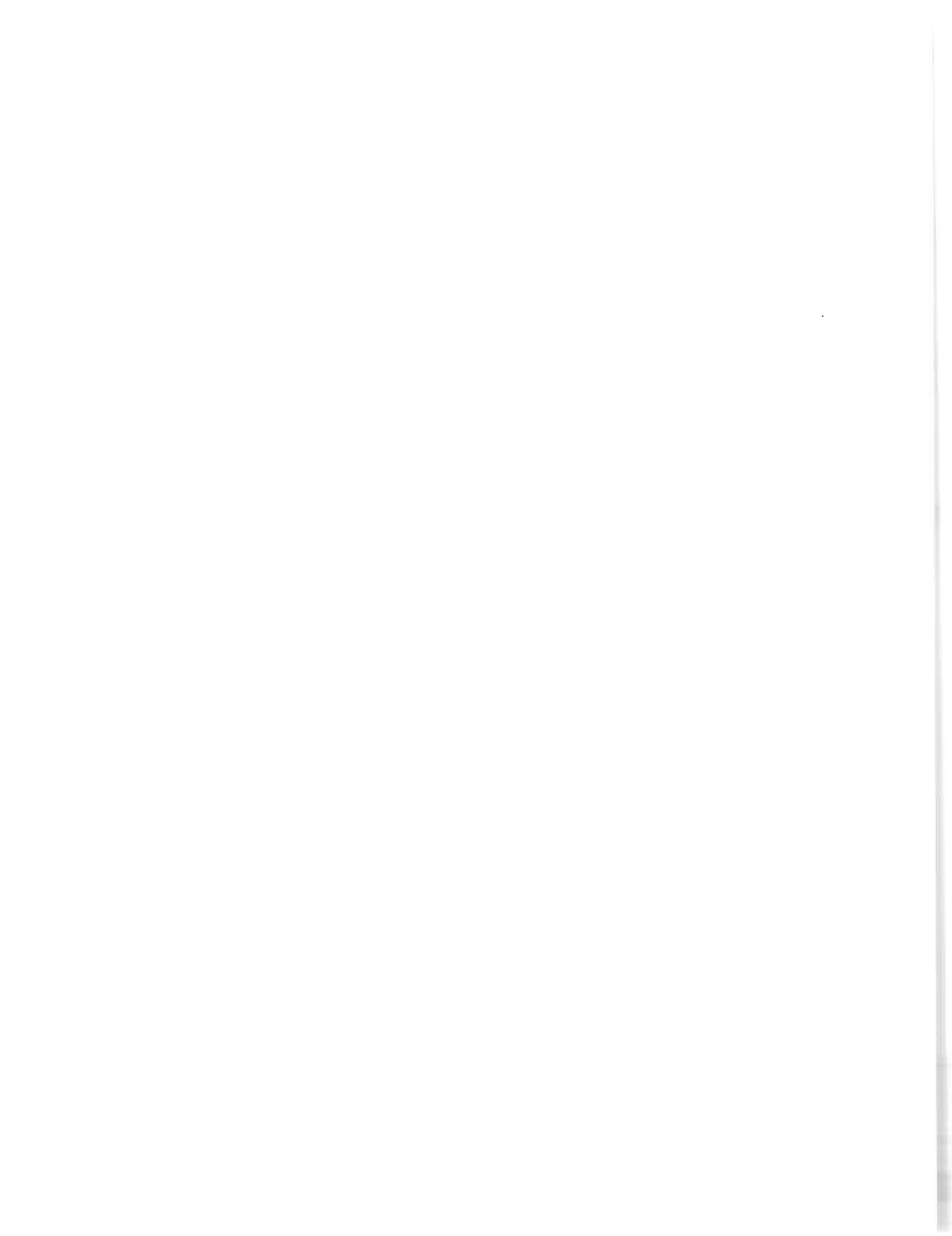


# Professional Administrators of the United Methodist Connectional Structure

## Profit & Loss Budget Vs. Actual

January - December 2023

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Nominating Committee		50.00	-50.00	
Prof Train & Standards				
Supplies		150.00	-150.00	
<b>Total Prof Train &amp; Standards</b>		<b>150.00</b>	<b>-150.00</b>	
Promotional Items Expense				
Charm	12.00		12.00	
<b>Total Promotional Items Expense</b>	<b>12.00</b>		<b>12.00</b>	
<b>Total Expenditures</b>	<b>\$74,834.63</b>	<b>\$24,625.00</b>	<b>\$50,209.63</b>	<b>303.90 %</b>
NET OPERATING REVENUE	<b>\$ -8,050.43</b>	<b>\$0.00</b>	<b>\$ -8,050.43</b>	<b>0.00%</b>
NET REVENUE	<b>\$ -8,050.43</b>	<b>\$0.00</b>	<b>\$ -8,050.43</b>	<b>0.00%</b>



PROFESSIONAL ADMINISTRATORS OF THE UNITED METHODIST CONNECTIONAL STRUCTURE  
**TREASURER'S REPORT (Un-Audited)**  
 December, 2023

<b>GENERAL FUND</b>			
BALANCE BROUGHT FORWARD 12-31-22			\$134,108.77
RECEIPTS FROM ALL SOURCES			\$19,829.25
RECEIPTS FROM GCFA SAVINGS/INT			\$282.72
DISBURSED FOR THIS PERIOD			\$22,582.83
BALANCE AS OF 12-31-23			\$131,637.91
<b>SCHOLARSHIP FUND</b>			
BALANCE BROUGHT FORWARD 12-31-22			\$5,865.04
RECEIPTS THIS PERIOD			\$1,093.00
DISBURSED THIS PERIOD			\$300.00
BALANCE AS OF 12-31-23			\$6,658.04
<b>ANNUAL CONFERENCE FUND</b>			
BALANCE BROUGHT FORWARD AS OF 12-31-22			\$15,703.81
RECEIPTS THIS PERIOD			\$43,624.19
DISBURSED THIS PERIOD			\$51,758.98
BALANCE AS OF 12-31-23			\$7,569.02
<b>ENDOWMENT FUND</b>			
BALANCE BROUGHT FORWARD AS OF 12-31-22			\$81,685.05
RECEIPTS/UNREAL GAIN THIS PERIOD			\$1,955.04
DISBURSED/UNREAL LOSS THIS PERIOD			\$192.82
BALANCE AS OF 12-31-23			\$83,447.27
	ENDING MARKET VALUE	\$81,414.47	COST VALUE \$83,447.27
BALANCE AS OF 12-31-23			
GENERAL FUND			\$131,637.91
	UNDESIGNATED OPERATING	\$34,928.76	
	MONEY MARKET	\$70,577.79	
	GCFA SAVINGS ACCOUNT	\$26,131.36	
SCHOLARSHIP FUND			\$6,658.04
ANNUAL CONFERENCE FUND			\$7,569.02
ENDOWMENT FUND			\$83,447.27
TOTAL FUND BALANCES			\$229,312.24
<b>ACCOUNT BALANCE AS OF 12-31-23</b>			
GCFA SAVINGS FUND ACCOUNT			\$26,131.36
ADMINISTRATIVE CHECKING ACCOUNT			\$49,150.82
ADMINISTRATIVE MONEY MARKET ACCOUNT			\$70,577.79
ADMINISTRATIVE SAVINGS ACCOUNT			\$5.00
ENDOWMENT FUND AT GCFA			\$83,447.27
TOTAL ACCOUNT BALANCES			\$229,312.24

Approved by Finance Chair  
 Date 1-9-24 Initials RS

# Professional Administrators of UM Connectional Structure

## Income and Expense by Class

January - December 2023

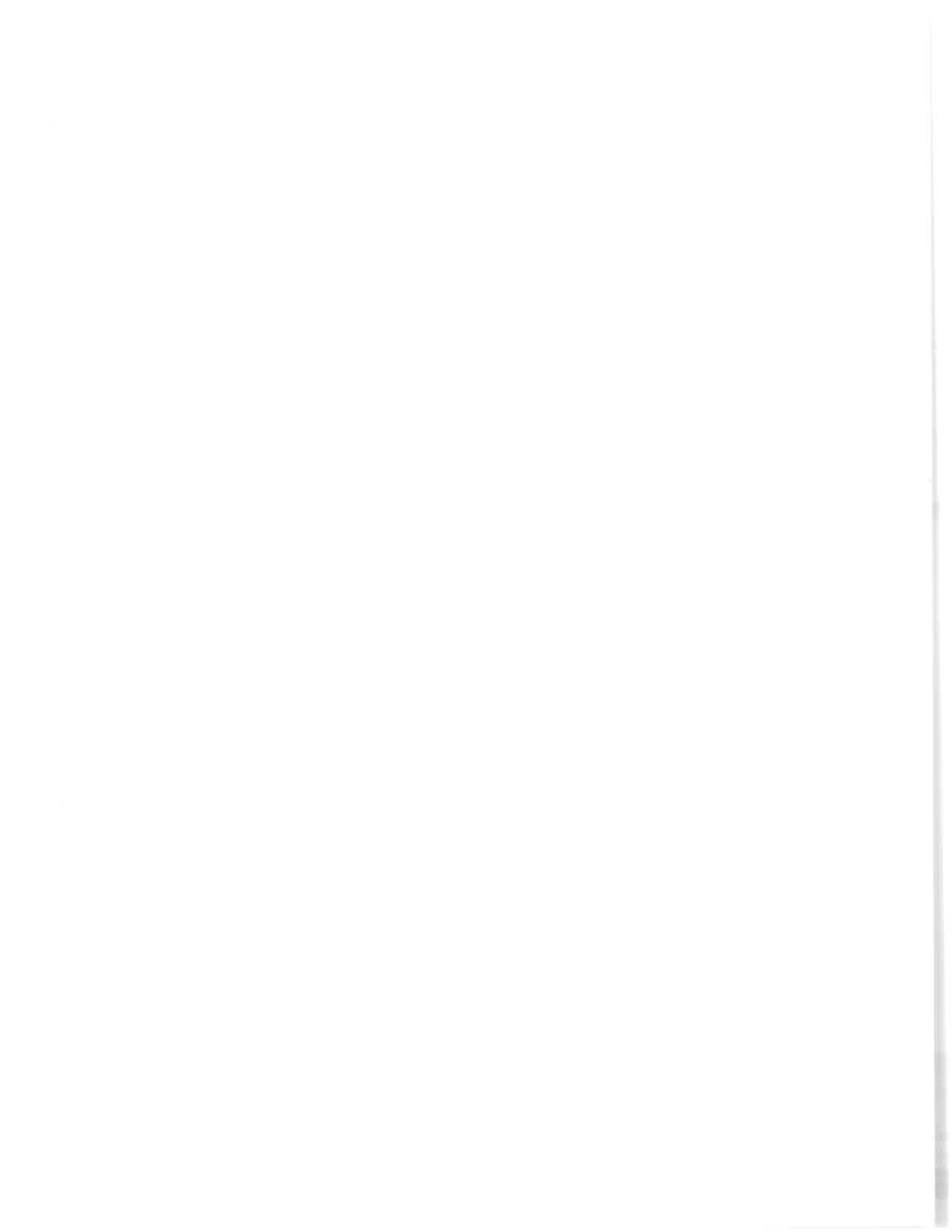
	2023 ANNUAL CONFERENCE	2024 ANNUAL CONFERENCE	TOTAL ANNUAL CONFERENCE	ENDOWMENT FUND	GCPA SAVINGS FUND	GENERAL FUND	LESLIE BAYLES SCHOLARSHIP	TOTAL
<b>Revenue</b>								
2023 Membership dues	0.00	0.00	0.00	0.00	0.00	9,050.00	0.00	\$9,050.00
Annual Meeting Income	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
2023 Conference registration	0.00	350.00	350.00	0.00	0.00	1,650.00	0.00	\$2,000.00
2024 Conference Registration	0.00	0.00	8,562.00	0.00	0.00	0.00	0.00	\$8,562.00
EFT Registration Income/Vanco	0.00	21,730.00	21,730.00	0.00	0.00	0.00	0.00	\$21,730.00
Guests	0.00	1,000.00	1,000.00	0.00	0.00	0.00	0.00	\$1,000.00
Meals	0.00	2,748.19	2,748.19	0.00	0.00	0.00	0.00	\$2,748.19
Sponsor	0.00	1,000.00	1,000.00	0.00	0.00	0.00	0.00	\$1,000.00
<b>Total Meals</b>	<b>0.00</b>	<b>3,748.19</b>	<b>3,748.19</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>\$3,748.19</b>
Registration	0.00	2,175.00	2,175.00	0.00	0.00	0.00	0.00	\$2,175.00
Virtual Registration	0.00	3,925.00	3,925.00	0.00	0.00	0.00	0.00	\$3,925.00
Wednesday Outing	0.00	1,525.00	1,525.00	0.00	0.00	0.00	0.00	\$1,525.00
<b>Total Annual Meeting Income</b>	<b>0.00</b>	<b>34,453.19</b>	<b>34,453.19</b>	<b>0.00</b>	<b>0.00</b>	<b>1,650.00</b>	<b>0.00</b>	<b>\$44,065.19</b>
Endowment	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Endowment Donations	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Endowment Interest/Dividends	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
<b>Total Endowment</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>\$0.00</b>
Interest	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Checking	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
GCPA	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Money Market	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
<b>Total Interest</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>\$0.00</b>
Miscellaneous	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
PAUMCS Memorial Scholarship Fund	0.00	0.00	0.00	0.00	0.00	8,747.76	0.00	\$8,747.76
Promotional Items	0.00	0.00	0.00	0.00	0.00	0.00	1,093.00	\$1,093.00
Charity	0.00	465.00	465.00	0.00	0.00	0.00	0.00	\$465.00
<b>Total Promotional Items</b>	<b>0.00</b>	<b>465.00</b>	<b>465.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>\$465.00</b>
<b>Total Revenue</b>	<b>\$0.00</b>	<b>\$34,918.19</b>	<b>\$34,918.19</b>	<b>\$43,824.19</b>	<b>\$282.72</b>	<b>\$19,829.25</b>	<b>\$1,093.00</b>	<b>\$66,784.20</b>
<b>GROSS PROFIT</b>	<b>\$0.00</b>	<b>\$34,918.19</b>	<b>\$34,918.19</b>	<b>\$43,824.19</b>	<b>\$282.72</b>	<b>\$19,829.25</b>	<b>\$1,093.00</b>	<b>\$66,784.20</b>
<b>Expenditures</b>								
Annual Meeting Expenses	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Chapter Reimbursement	0.00	456.50	456.50	0.00	0.00	0.00	0.00	\$456.50
Dinner Cruise Guest	0.00	0.00	0.00	0.00	0.00	680.00	0.00	\$680.00
EFT Fees	0.00	744.72	744.72	0.00	0.00	245.48	0.00	\$990.20
Equipment	0.00	7,740.32	7,740.32	0.00	0.00	0.00	0.00	\$7,740.32
Meals/Breaks	0.00	19,904.62	19,904.62	0.00	0.00	0.00	0.00	\$19,904.62
Miscellaneous	0.00	510.00	510.00	0.00	0.00	2,304.32	0.00	\$2,814.32
Name Tags	0.00	90.00	90.00	0.00	0.00	0.00	0.00	\$90.00
Printed Material	0.00	50.00	50.00	0.00	0.00	0.00	0.00	\$50.00
Registration Refund	0.00	350.00	350.00	0.00	0.00	0.00	0.00	\$350.00
Speakers	0.00	1,500.00	1,500.00	0.00	0.00	0.00	0.00	\$1,500.00
Wednesday Outing	0.00	0.00	0.00	0.00	0.00	1,860.00	0.00	\$1,860.00
<b>Total Annual Meeting Expenses</b>	<b>0.00</b>	<b>31,246.16</b>	<b>31,246.16</b>	<b>\$8,748.02</b>	<b>0.00</b>	<b>5,119.80</b>	<b>0.00</b>	<b>\$45,063.82</b>
Certification	0.00	53.58	53.58	0.00	0.00	1,650.00	300.00	\$2,003.58
Communications	0.00	0.00	0.00	0.00	0.00	40.00	0.00	\$40.00
Database Maintenance/Host	0.00	0.00	0.00	0.00	0.00	25.00	0.00	\$25.00
Website	0.00	0.00	0.00	0.00	0.00	50.00	0.00	\$50.00
<b>Total Communications</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>115.00</b>	<b>0.00</b>	<b>\$115.00</b>
Endowment Expenses	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Fees	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
<b>Total Endowment Expenses</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>\$0.00</b>

# Professional Administrators of UM Connectional Structure

## Income and Expense by Class

January - December 2023

	ANNUAL CONFERENCE FUND	2023 ANNUAL CONFERENCE	2024 ANNUAL CONFERENCE	TOTAL ANNUAL CONFERENCE FUND	ENDOWMENT FUND	GOFA SAVINGS FUND	GENERAL FUND	LESLIE BAYLES SCHOLARSHIP	TOTAL
Executive Committee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Admin Expenses	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Postage	0.00	0.00	0.00	0.00	0.00	0.00	78.80	0.00	\$78.80
Travel/Meals	0.00	3,086.31	0.00	3,086.31	0.00	0.00	14,769.42	0.00	\$17,855.73
<b>Total Admin Expenses</b>	<b>0.00</b>	<b>3,086.31</b>	<b>0.00</b>	<b>3,086.31</b>	<b>0.00</b>	<b>0.00</b>	<b>14,848.22</b>	<b>0.00</b>	<b>\$17,934.53</b>
<b>Total Executive Committee</b>	<b>0.00</b>	<b>3,086.31</b>	<b>0.00</b>	<b>3,086.31</b>	<b>0.00</b>	<b>0.00</b>	<b>14,848.22</b>	<b>0.00</b>	<b>\$17,934.53</b>
Executive Committee Admin.	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Exec. Com. Meals/Lodging	0.00	4,815.60	0.00	4,815.60	0.00	0.00	0.00	0.00	\$4,815.60
Travel to Ann'l Mtg.	0.00	5,042.47	0.00	5,042.47	0.00	0.00	0.00	0.00	\$5,042.47
<b>Total Executive Committee Admin.</b>	<b>0.00</b>	<b>9,858.07</b>	<b>0.00</b>	<b>9,858.07</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>\$9,858.07</b>
Finance Committee	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
EFT fees/Vanco	0.00	0.00	0.00	0.00	0.00	0.00	509.12	0.00	\$509.12
Membership Fees online	0.00	0.00	0.00	0.00	0.00	0.00	282.15	0.00	\$282.15
Miscellaneous Fees	0.00	0.00	0.00	0.00	0.00	0.00	0.17	0.00	\$0.17
Postage/Finance	0.00	0.00	0.00	0.00	0.00	0.00	8.37	0.00	\$8.37
<b>Total Finance Committee</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>799.81</b>	<b>0.00</b>	<b>\$799.81</b>
Membership	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Membership Expenses	0.00	0.00	0.00	0.00	0.00	0.00	50.00	0.00	\$50.00
<b>Total Membership</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>50.00</b>	<b>0.00</b>	<b>\$50.00</b>
Promotional Items Expense	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	\$0.00
Charm	0.00	0.00	12.00	12.00	0.00	0.00	0.00	0.00	\$12.00
<b>Total Promotional Items Expense</b>	<b>0.00</b>	<b>0.00</b>	<b>12.00</b>	<b>12.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>0.00</b>	<b>\$12.00</b>
<b>Total Expenditures</b>	<b>\$0.00</b>	<b>\$44,344.12</b>	<b>\$7,614.86</b>	<b>\$51,756.98</b>	<b>\$192.82</b>	<b>\$0.00</b>	<b>\$22,582.83</b>	<b>\$300.00</b>	<b>\$74,834.63</b>
<b>NET OPERATING REVENUE</b>	<b>\$0.00</b>	<b>\$ (8,425.83)</b>	<b>\$1,291.14</b>	<b>\$ (8,134.79)</b>	<b>\$1,762.22</b>	<b>\$282.72</b>	<b>\$ (2,783.58)</b>	<b>\$793.00</b>	<b>\$ (8,050.43)</b>
<b>NET REVENUE</b>	<b>\$0.00</b>	<b>\$ (9,425.83)</b>	<b>\$1,291.14</b>	<b>\$ (8,134.79)</b>	<b>\$1,762.22</b>	<b>\$282.72</b>	<b>\$ (2,783.58)</b>	<b>\$793.00</b>	<b>\$ (8,050.43)</b>



# Account Statement

January 01, 2023 - December 31, 2023

# FOUNDATION

## Investment Management

### Endowment (PAUMCS) - Touching Tomorrow For Today



■ FIMGT - Methodist  
Socially Principled Plus

#### Activity Summary

<b>Beginning Market Value</b>	<b>\$70,247.05</b>
Deposits to Account	\$257.00
Investment Income	\$1,834.85
Distributions from Account	\$0.00
Account Fees	(\$299.22)
Market Value Changes	\$9,374.79
<b>Ending Market Value</b>	<b>\$81,414.47</b>

#### Realized Gain/Loss Summary

This Statement	(\$30.41)
Year to Date	(\$30.41)

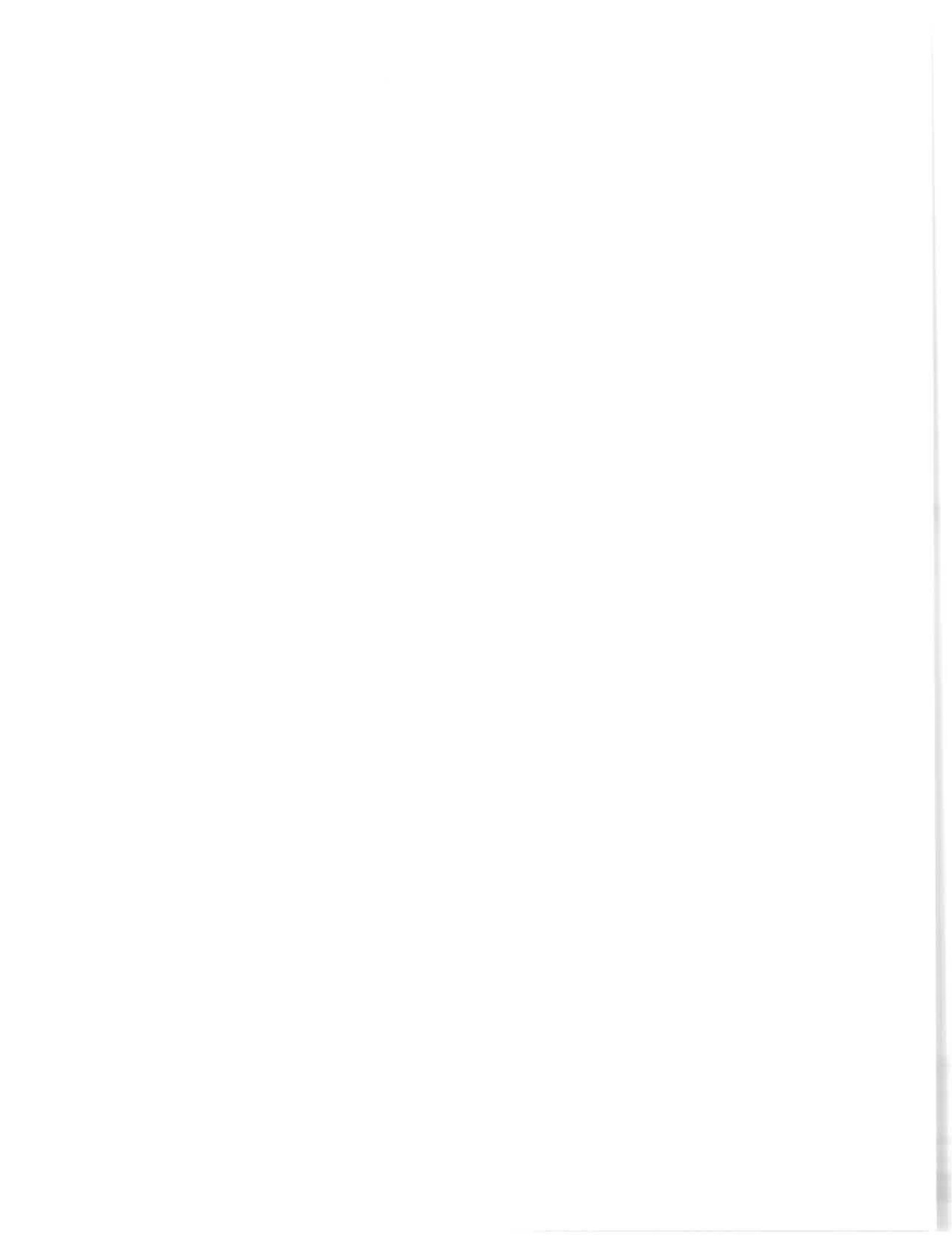
#### Account Holdings

Investment Name	Beginning Cost Basis	Beginning Market Value	Ending Cost Basis	Ending Market Value
FIMGT - Methodist Socially Principled Plus	\$81,685.05	\$70,247.05	\$83,447.27	\$81,414.47
<b>Total</b>	<b>\$81,685.05</b>	<b>\$70,247.05</b>	<b>\$83,447.27</b>	<b>\$81,414.47</b>

The endowment is set up for an annual distribution that is calculated during the initial funding of the account. Following is a schedule of the available distributions dating back to 2012. There have only been two distributions taken - once in 2017 and again in 2020. Ordinarily the distribution is only allowed for the amount for that particular year, however a one time exception can be made to take amounts up to four years or to the last distribution year, whichever is shorter. Since the last distribution was taken in 2020, a one time distribution in 2024 of the combined distribution amounts for 2021, 2022, and 2023 could be made totaling \$6,907.16.

#### Available Distribution Amounts by Year

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022
to be taken in	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
	1,298.74	1,360.44	1,442.42	1,626.55	1,761.64	1,865.87	1,976.56	2,054.61	2,114.88	2,172.08	2,328.16	2,406.92





# PROPOSED Slate of Officers for 2024-2025 PAUMCS

The Nominating Committee, in accordance with the PAUMCS By-Laws, submit for approval by GCFA the following slate of candidates elected at 2024 Annual Conference of the Professional Administrators of the United Methodist Connectional Structure Business Meeting.

Names in **bold** indicate a new candidate in said position for the 2024-2025 year.

Numbers in parenthesis in the **E.C. Current** Column indicate the number of years the candidate has served on the Executive Committee in the current position and in the **E.C. Total** column is the total number of years served in the Executive Committee in any position.

\*GCFA Certified Members

\*\*GCFA Advance Certified Members

## EXECUTIVE COMMITTEE (all must be GCFA Certified & employed within the UMC Structure)

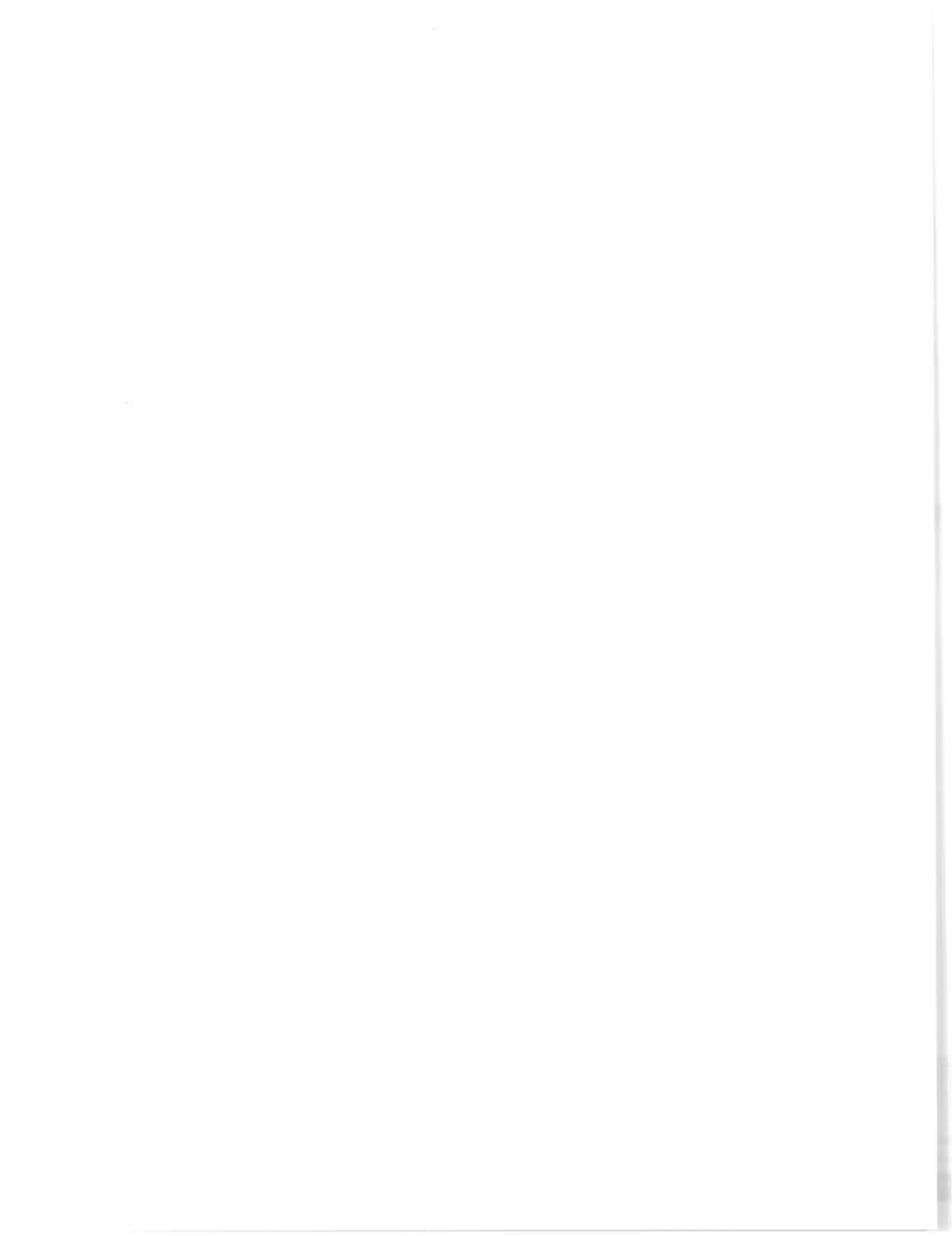
<u>Position</u>	<u>Name</u>	<u>State</u>	<u>E.C. Current</u>	<u>E.C. Total</u>
President	** <b>Brenda Lockhart</b>	TN	(0)	(2)
Vice President	** <b>Gail Douglas-Boykin</b>	NY	(0)	(10.5)
Secretary	** <b>Bindy Lewis</b>	TN	(0)	(0)
Treasurer	**Wendy Miller	IL	(1)	(1)
Communications Committee Chair	** <b>Ria Fruscello</b>	PA		
Finance Committee Chair	**Robin Stanfield	TN	(1)	(1)
Membership Committee Chair (nominated by Executive Committee)	** <b>Lonna Nunn</b>	TX	(0)	(0)
Nominating Committee Chair	**Timolin Colbert	TX	(1)	(1)
PTS Committee Chair (appointed by General Secretary of GCFA)	**Judy Gross	LA	(1)	(1)
GCFA Staff Representative (ex-officio with vote)	*Tammie Ruffle	TN		

## STANDING COMMITTEES

	<u>Class of 2025</u>	<u>Class of 2026</u>	<u>Class of 2027</u>
COMMUNICATIONS	**Betty Yeomans-Barton - TN	*Sharon Bright – TX	** <b>Ria Fruscello</b> - PA
<i>The PAUMCS president shall also serve ex-officio with voice and vote.</i>			
FINANCE	*Juliet Blevins- GA **Lisa Gleason - OH	*Daniel Kasbohm - GA Dora Thackery - MO	** <b>Robin Stanfield</b> - TN ** <b>Chris Grosson</b> - TN
<i>The PAUMCS president, vice president and treasurer shall also serve ex-officio with voice and vote.</i>			
MEMBERSHIP	**Lonna Nunn - TX	** <b>Natalie Valerio</b> - TN	* <b>Alison Huskey</b> - AR
<i>The PAUMCS president shall also serve ex-officio with voice and vote.</i>			
NOMINATING	**Timolin Colbert - TX	*Beth O'Brien - NC *Paige Ross - TN	
<i>The PAUMCS membership chair shall also serve ex-officio with voice and vote.</i>			
Any vacant positions in the Nominating classes are nominated from the floor during the PAUMCS annual business meeting at annual conference.			
PROFESSIONAL	*DeEtta Rivens - NC	**Renee Farrar - GA	* <b>Ronda Riffe-Rathje</b> - IL
TRAINING & STANDARDS	**Judy Gross - LA	*Susan Taylor - NC	* <b>Eva Jankowske</b> - MI
The PAUMCS president, vice president, and GCFA staff representative shall also serve ex-officio with voice and vote.			

In accordance with the PAUMCS Bylaws, the PAUMCS slate of officers elected at the 2024 PAUMCS Annual Business Meeting will then be submitted by the Nominating Committee for approval at the Annual Meeting of the General Council on Finance and Administration (GCFA).

Respectfully submitted by PAUMCS Nominating Committee April 2024  
Timolin Colbert, Chair



## 2023 Report of The Professional Training and Standards (PTS) Committee

The PTS Committee is excited to report that our PAUMCS membership is very active in attending ongoing training to earn Continuing Education credits. In 2023, we granted CEUs for attendance at our National Conference in Minneapolis to 53 national members of PAUMCS. We had 24 members who completed the Certification Institute and 20 members who completed the Advanced Certification Course, including one member who completed both in the same year!

The PTS Committee also awarded CEUs to national members who attended Chapter events: we granted CEUs to nine who attended the Missouri Fall Conference and seven who attended the Western North Carolina Fall Conference. We also granted CEU credits to two members who attended General Conference Training.

Our committee also oversees the requests for scholarships to attend National Annual Conference and Certification Classes. This year we granted scholarships to four members to attend Certification Classes and eight to attend Advanced Certification Classes.

The PAUMCS Memorial Scholarship Fund is available to help with the costs of Annual Conference and also Certification Classes. A donation to the fund is a great way to honor someone. Donations may be sent at any time during the year to our treasurer, Wendy Miller.

The PTS Committee looks forward to serving you in 2024. Keep learning!

Judy Gross  
PTS Chair

